



Investment Management

We are dedicated to helping you achieve your investment goals by providing personal attention and quality services.

How we help you succeed

We provide cost-efficient portfolio construction, take on the right level of risk, and ensure that experts are behind every choice made in your portfolio.



Reach your goals | Maintain confidence | Balance risks, rewards

Our services

We offer a range of investment resources and services to help you reach your goals:

- Comprehensive portfolio management
- Ongoing investment monitoring
- Periodic reviews
- Total integration with your financial plan
- Asset allocation and broad diversification
- Low cost investments
- Rebalancing
- Asset location
- Spending strategy
- Total return vs. Income investing
- Behavioral coaching
- Consulting and reporting on outside accounts

How we communicate with you

Scheduled outreach includes regular planning reviews, check-ins, ongoing education opportunities and timely resources. You can also count on a response within 24 hours whenever you contact us with a question or concern.

Our fee structure

Our investment advisory practice is fee based. Our annual advisory fees are calculated simply as a percentage of assets under management. Our fees are not based on trading activity or commissions. The table below reflects what our fees may look like for you.

AMOUNT MANAGED	ADVISORY FEE
Up to \$1,000,000	0.50%
\$1,000,000 to \$11,000,000	0.25%
More than \$11,000,000	0.00%

* Additional charges may apply based on planning needs. Consult your advisor for fee arrangement specific to your circumstances.

Disclosures

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